

## REINVENTING ONLINE SHOPPING FOR RED MEAT

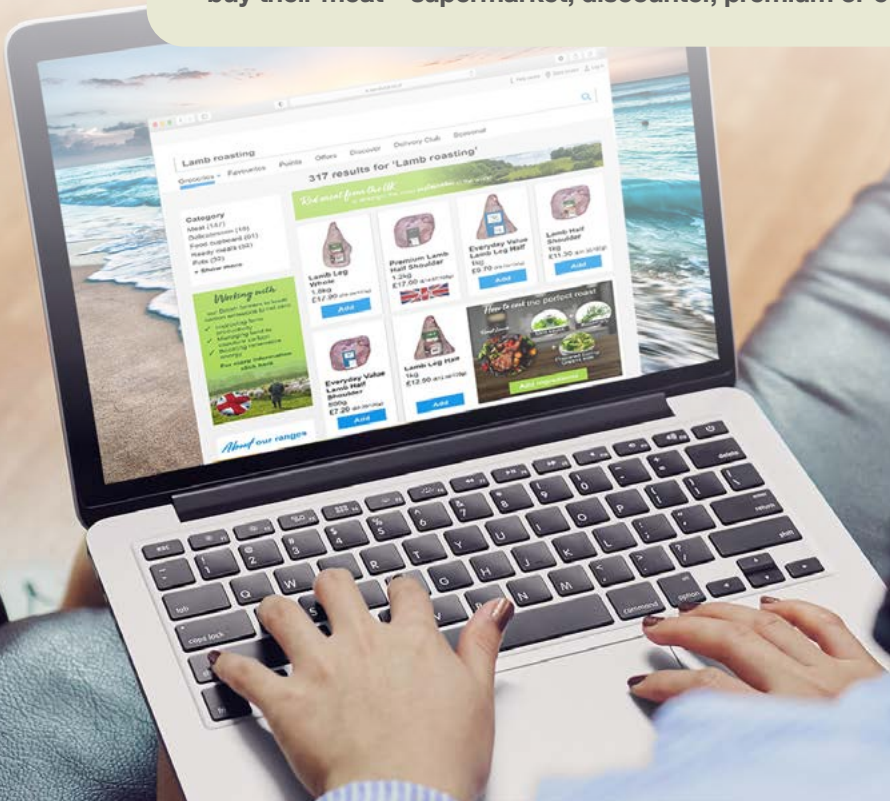
Share of online grocery sales is predicted to reach 11.2% in 2027, accounting for £1 in every £9 spent on groceries (IGD, UK Channel Forecasts, June 2022). For 2021, online share of total grocery was 10.3%, up 4.1 percentage points on pre-pandemic levels (2019) according to IGD.

Red meat under-trades online as there are still a number of barriers for consumers. Pre-pandemic category losses stemmed from those who were **unconsciously moving away from consuming red meat**.

Therefore, AHDB commissioned research to understand how to better engage and communicate with meat shoppers online. Conducted by Linney in the first half of 2022, the research streamlined a range of communication ideas, generated in partnership with the industry, to develop mock website pages. For more information about the methodology, please see page 25.

### Key findings

- Online platforms allow for flexible communication, which is required as a variety of messages are needed to drive different responses
- For the homepage, the communication should attract shoppers to the category. This should be done through messaging that will be beneficial to shoppers personally, like leanness and awards
- For the search page, the communication should reassure shoppers on taste and reputational factors such as health, welfare or sustainability, and convert them to purchase
- The product page should inform and inspire; here we can have the most detailed information on recipes, production methods and product credentials
- These findings hold universal appeal, regardless of where shoppers usually buy their meat – supermarket, discounter, premium or convenience



## BACKGROUND

In 2019, AHDB commissioned in-depth research into [how consumers shop for meat online](#), identifying the path to purchase, as well as purchase drivers. This report builds on that by identifying exactly what retailers should be communicating for meat along the online path to purchase, and how, to better engage shoppers. This builds on the equivalent research [in-store](#) where AHDB insights initiated positive change in the market.

## Online Market Context

The pandemic and lockdowns had a huge impact on [online shopping](#). The number of households shopping online increased by 11 percentage points (%pts) to 39% in 2021, and those who were already shopping online increased their number of orders according to Kantar.

### Households Shopping Online in 2021



Source: Kantar, 52 w/e 26 December 2021

Sales of meat, fish and poultry (MFP) online have been boosted by this increase in shopper numbers with volumes up 57% compared to before the pandemic (Kantar, 12 weeks ending 17 April 2022) with all meats seeing growth online. However, primary red meats still under-trade online compared to in-store. Primary lamb sees the biggest under-trade, but beef and pork also see a smaller share online than we would expect. See our [website](#) for more information and detail about what cuts drive this.

With all these new shoppers moving to the online channel but meat not reaching its full potential, the biggest opportunity is to increase basket size through this valuable category.

## Online Meat Shopper Journey

Since the Online [Meat Shopper Journey](#) research in 2019, the market has undoubtedly evolved. While fundamental online shopping behaviours will have remained consistent, it is important to identify what has remained the same, or changed, as the market has grown.

### Why consumers shop for groceries online

Convenience remains the number one reason why consumers shop online, citing it is quicker and easier than going in-store. However, online lends itself to main/bigger missions, with top-up and quick mission shops remaining a small part of the market, although growing. Value and the ability to control spend are continued reasons why consumers choose online, and these are even more important with the current cost-of-living crisis.

### How consumers shop for groceries online

While previous research showed most consumers did their grocery shop in one go, at home and on a big screen such as a laptop or PC, this appears to have changed. Consumers are now more inclined to shop over many sessions, adding to their basket or making changes right up to the last moment and utilising mobiles. Therefore, it is more important than ever to ensure websites are mobile or app friendly.

As well as online grocery shops becoming more flexible, consumers are increasingly utilising shortcuts. While in 2019 only 52% of consumers claimed to use favourite lists, in our recent study 77% claim to use favourites or repeat orders. They are also savvier about areas of the website that narrow down choice. Promotional pages proved to be popular back in 2019, and they continue to be, with four out of five shoppers actively looking for promotions and deals. 64% claim to look at seasonal and event pages. Lastly, checkout walks (the web pages between choosing to check out and paying, for example 'offers chosen for you', 'suggestions' or 'have you missed') have evolved since the last research and have been found to be highly engaging. While this research focuses on the most popular navigation pages from the previous research – homepage, search page, category page and product page (the latter being particularly important for more premium meat items) – it is important to translate these findings elsewhere on the website.

### **How consumers choose fresh meat online**

From tracking shopper-decision drivers across a number of sources over time, we have learnt that they have not changed, with price, taste and convenience being vital. In 2019, our insights stripped out the differences between claimed and actual behaviour.

Unsurprisingly price was the top purchase driver. However, because of the nature of online and the inability to physically handle the products, appearance ranked quite high. The right quality tier became much more important to reassure customers, potentially acting as a substitute for taste. Taste only ranked eighth in the list, driving 21% of meat choices. This is compared to in-store where it was claimed to be the second most important factor, driving 40% of decisions. Similar to in-store, aspects such as British and Quality Assurance became less important at the point of purchase, at the expense of more practical factors such as 'know how to cook', freezability and 'part of a specific meal/recipe'. However, since the original study, the importance of local, sustainability and welfare have grown for consumers. Therefore, complementing practicality messaging with reputational would be the optimum as we see later. For more information please see the [Online Meat Shopper Journey](#).

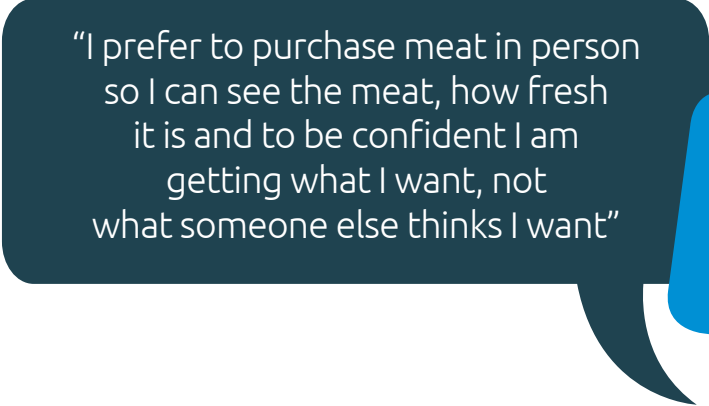
### **How consumers receive their groceries online**

In 2019, nearly all shoppers surveyed (96%) opted for delivery to their homes rather than Click and Collect. According to Mintel, home delivery dominated in 2021 with 81% of online grocery shoppers typically choosing this option, but a third now claim to also use collection (Mintel, Online Grocery Retailing UK, 2022). Loyalty schemes, such as delivery passes, and a good experience with delivery drivers and Click and Collect staff are successful ways for retailers to capture repeat shoppers.




## BARRIERS TO ONLINE SHOPPING

Shopping online is naturally more complicated as consumers can't interact with products. According to IGD, it is the top reason why consumers don't shop online, with 69% claiming they prefer to pick their own produce in-store. This is even more apparent for fresh categories such as meat with over half (56%) of shoppers in our recent research saying they find it hard to buy meat online because they can't see it and 60% claiming they find it harder to judge product quality online (despite it being a key decision driver as mentioned above).

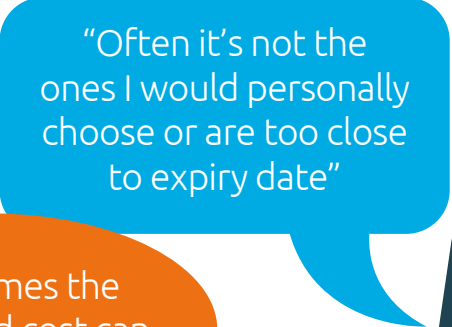


"I prefer to purchase meat in person so I can see the meat, how fresh it is and to be confident I am getting what I want, not what someone else thinks I want"




"I worry about the freshness"


Even among those who do shop online, concerns in this area are still apparent with shoppers saying the inability to see best before dates and confusion about sizes are reasons why they dislike shopping for meat online.



"Often it's not the ones I would personally choose or are too close to expiry date"



"Sometimes the weight and cost can be confusing"



"Difficult to picture the pack size"

According to IGD, most shoppers do not enjoy grocery shopping in-store or online, seeing it more as a chore and wanting to get it done quickly. In our most recent research, 46% of consumers claimed they found shopping online less inspirational than in-store. Therefore, making the online grocery shopping experience inspiring, informative and engaging could encourage longer dwell times and additional opportunities for conversion.



## OPTIMISING THE ONLINE EXPERIENCE

Before going on to the findings of the research, it is important to highlight the fundamentals that need to be right to ensure that a retailer captures, and keeps, shoppers. If the basics are right, additional category messaging and imagery will work most efficiently.

### Retail Fundamentals

It is important to understand why a shopper chooses a particular retailer for their online grocery shop. This will allow retailers to deliver competitively on these needs.



\* 50% of shoppers worry about the environmental impact of grocery shopping online

(Mintel, Online Grocery Retailing UK, 2022)

### Optimising the Experience – Category Fundamentals

Once a retailer has been chosen it is important that a shopper can quickly and easily find the products that they want and have the right level of information to convert to purchase.

#### Find

The most popular ways to navigate to meat online are through search (71%) and category pages (43%) therefore:

- **Search terms** must be optimised to account for shoppers searching by means other than simple product name, for example, by meal or occasion. **Ask yourself – in your category, are the right products returned for relevant searches?**
- The category page **taxonomy** is the online version of the aisle and shelf location and therefore it must replicate this experience. **Ask yourself – can shoppers easily find the meat and cut they are looking for in the right format?**
- The **position** your products appear on a page is key. According to IGD, when shopping online 75% of selections are made in under 24 seconds, with 89% made on the first web page. For laptops, typically only the top row is visible in the first instance highlighting only four products – less on mobile devices with only two products.

Testing by IGD has proved a significant sales uplift for products moved to first pages and even more so with increased ranking so you are closer to the top. **Ask yourself – are your products high enough on the page?**

## Convert

- **Imagery** is vital as we know consumers shop by scanning images and the right image drives sales. However, many images seen online do not give the shopper enough information. A Mobile Ready Hero Image (MRHI) is an image representing the physical pack optimised for online as it dials up important elements. **Ask yourself – for your product images, can you clearly see what the product is, which brand it is, which variety it is and what size it is?**



Source: MRHI from The Grocer

Having multiple images can also better replicate the in-store experience, such as different angles, in-hand scale and out-of-pack, and even 3D. Additional images could focus on cooked meals using the product, usage suggestions or features and benefits.



Source: IGD

- To complement the image, **product descriptions** must have a clear title, key points (preferably consumer benefits) with bullet points up front as well as utilising relevant sensory and buzz words to aid search. **Ask yourself – on your product page can your shopper get all the information they need, with no jargon, without scrolling?**
- Shoppers value **reviews** with 66% of consumers trusting them, higher than paid-for ads, according to IGD. As they are impartial, positive reviews act as reassurance. **Ask yourself – on the product page what do your reviews currently do for you?**

## OPTIMISING ONLINE COMMUNICATION

Our latest research looks into how we can optimise communications for meat online to increase category perceptions and drive purchase.

It can be easier to implement messaging online than in-store and it can be updated and changed quicker and with less spend, meaning overall it is a more adaptable platform to communicate with shoppers. The online environment allows for a more flexible mix of communication territories that deliver on both immediate in-moment reassurance and support longer-term equity.

However, this means that there is no one silver bullet message or even one message per page.

We tested ideas within four territories: online, inspiration, health and farming. All of these did a different job in improving perceptions of the category.

ONLINE	INSPIRATION	HEALTH	FARMING
Convenient High quality	Tasty Exciting	Healthy Relevant	Sustainable Local

From the four territories we tested, the strongest seven themes were:

- Lean
- Freshness
- Quality Credentials
- Animal Welfare
- Vitamins and Minerals
- Meal Inspiration
- Sustainability



Examples of the homepage banners

There were three types of pages we looked at for this research: the homepage, search results page and product page. However, the results could be applied to similar pages.

To summarise, the key highlights per page were as follows:

For the homepage, the communication should attract shoppers to the category or meat type. This should be done through messaging that is beneficial to shoppers personally, such as personal health through leanness, freshness and award-winning quality.



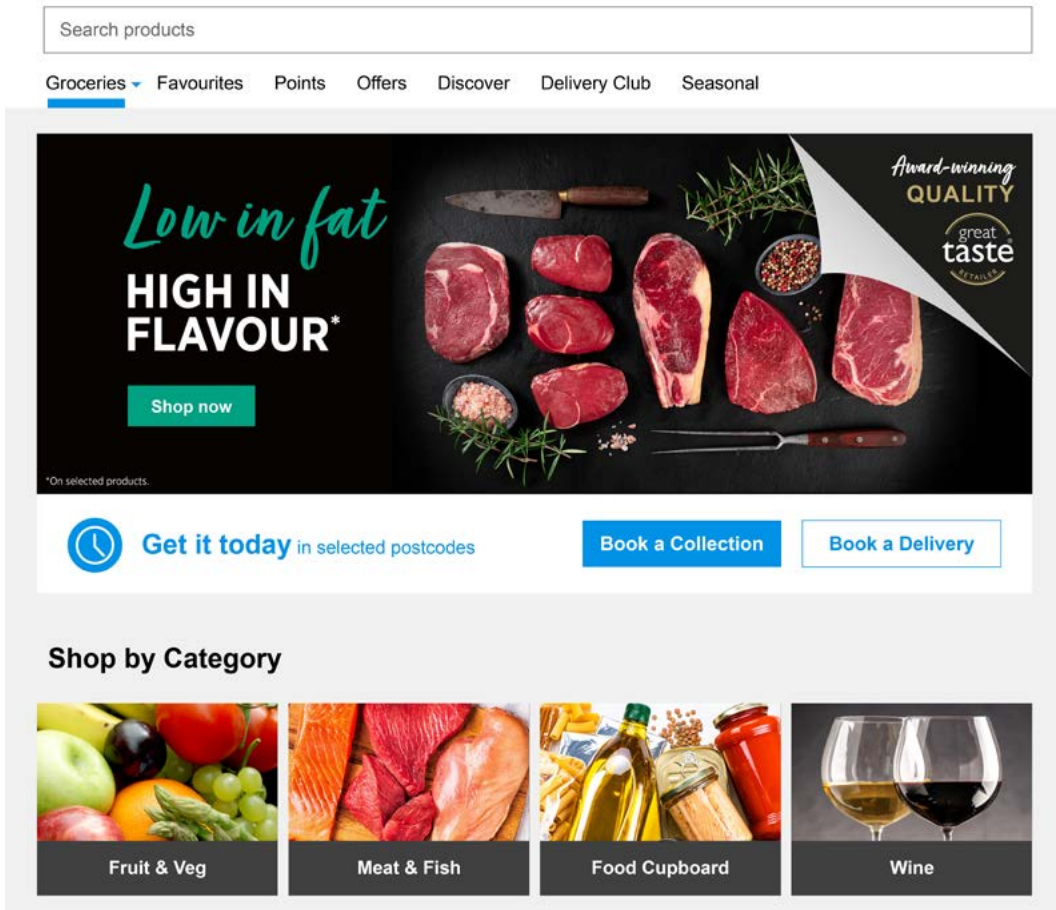
Online Shopping Consumer Journey



For the search page, the communication should reassure shoppers on taste and reputational factors such as health, welfare or sustainability, and convert them to purchase.

The product page should inform and inspire; here we can have the most detailed information on recipes, production methods and product credentials.

We can therefore showcase some examples of what best-in-class messaging could look like:



An example of an optimised homepage



317 results for 'Lamb roasting'

Category

- Meat (147)
- Delicatessen (18)
- Food cupboard (61)
- Ready meals (52)
- Pets (32)
- + Show more

Working with

our British farmers to lower carbon emissions to net zero.

- ✓ Improving farm productivity
- ✓ Managing land to capture carbon
- ✓ Boosting renewable energy

For more information click here



About our ranges

Premium

Make meal-times special. Featuring the finest cuts from our preferred UK farms.











Mid Tier

Protein-packed favourites to make every meal appetising.

Everyday Value

All your meat and poultry essentials at an affordable price.




 <p><b>Lamb Leg Whole</b> 1.8kg £17.90 (€9.95/100g)</p> <p>Add</p>	 <p><b>Premium Lamb Half Shoulder</b> 1.2kg £17.60 (€14.67/100g)</p> <p>Add</p>	 <p><b>Everyday Value Lamb Leg Half</b> 1kg £9.70 (€9.70/100g)</p> <p>Add</p>	 <p><b>Lamb Half Shoulder</b> 1kg £11.30 (€11.30/100g)</p> <p>Add</p>
 <p><b>Everyday Value Lamb Half Shoulder</b> 800g £7.20 (€9.00/100g)</p> <p>Add</p>	 <p><b>Lamb Leg Half</b> 1kg £12.50 (€12.50/100g)</p> <p>Add</p>	<p><i>How to cook the perfect roast</i></p> <p>Roast Lamb + Mint sauce + Rosemary + Prepared Spring Greens side</p> <p>Add ingredients</p>	
 <p><b>Premium Lamb Leg Whole</b> 1.8kg £22.50 (€12.50/100g)</p> <p>Add</p>	 <p><b>Everyday Value Lamb Leg Whole</b> 1.8kg £17.46 (€9.70/100g)</p> <p>Add</p>	 <p><b>Lamb Shank in Minted Gravy</b> 450g £4.25 (€9.45/100g)</p> <p>Add</p>	 <p><b>Organic Lamb Half Shoulder</b> 1kg £15.00 (€15.00/100g)</p> <p>Add</p>

An example of an optimised search page

**Pork steak**
🔍

Groceries ▾
Favourites
Points
Offers
Discover
Delivery Club
Seasonal




**Pork Loin Steaks 2 Pack**  
300g  
£2.30 (£7.67/kg)

Freshness guaranteed

Add

*How to cook*

**THE PERFECT**  
*Steak*



Cook for 7 minutes each side. Click here for our step-by-step video and recipe.

View video

**One pork steak**

Energy 718kJ 170kcal	Fat 2.7g	Saturates 0.9g	Sugars 0.3g Low	Salt 0.19g
9%	4%	5%	<1%	3%


**Product Description**  
Boneless pork loin steaks. From trusted farms. Working with selected farmers that we trust, to ensure high welfare standards and consistent quality. Hand trimmed by butchers for succulence.

**Information**  
**Storage**  
Suitable for home freezing. Ideally freeze as soon as possible after purchase but always by 'use by' date shown. Defrost thoroughly for a minimum of 12 hours in the fridge. Once defrosted use on the same day and do not refreeze. Follow the preparation guidelines above. Not suitable for cooking from frozen. Keep refrigerated. Once opened, use within 24 hours and always by 'use by' date shown.

**Cooking Instructions**  
**Shallow fry**  
For best results, pan fry. Brush each side of the medallions with oil and season with salt and pepper. Place in a pre-heated pan over on medium heat for 7 minutes each side. Leave to stand for 5 minutes after cooking.

*A great source of*

- ✓ Iron
- ✓ Zinc
- ✓ Potassium
- ✓ B12



An example of an optimised product page

## HOMEPAGE

Messaging on the homepage is important to attract people into the category and remind shoppers of the important role meat can play in a healthy diet. To increase click-through to meat products, having something stand out on the homepage is a great way of increasing traffic.

### What should it say?

Messaging on the homepage should focus on the personal benefits to the shopper, such as health through a leanness message, product freshness and quality messaging. All of these saw purchase intent increase on the homepage. Shorter messaging worked best on the homepage, with a simple-to-understand tagline gaining the most attention.

#### Purchase intent



Having a lean message was the most appealing for shoppers, boosting healthy perceptions by 6%pts across the two homepages we tested. However, when paired with other health messaging, quality perceptions decreased compared to the baseline. Therefore, a secondary message of the quality of the product counteracts this drop.




	Vitamins with lean	Vitamins with freshness	Lean with quality	Freshness with quality
Healthy	+6%pts	0%pts	+6%pts	+1%pts
High quality	-4%pts	-6%pts	0%pts	+4%pts

Not all products are lean and can use this claim. For products that might not be able to use a health message, freshness would be the next best option. When paired again with a quality message, we see an uplift in perceptions of high quality.




For these three areas, we tested a range of taglines to see which consumers preferred.

## Lean




These messages can only be used on products which are low in fat.

	Consumer first choice (%)
Low in fat, high in flavour	29% 
Fresh, lean and perfect with greens	26% 
Enjoy healthy mealtimes with lean protein	17% 
Lean and luxurious - the perfect product to perfect your plate	15%
An outstanding source of lean protein	13%

## Quality

	Consumer first choice (%)
Award-winning quality	25% 
Winning quality and flavour	24% 
Recognised for our quality	20% 
Gold standard quality	16%
Trust our award-winning products	15%

## Freshness

	Consumer first choice (%)
Freshness guaranteed	33% 
Fresh for at least 7 days	28% 
7+ days shelf life	25% 
As fresh as buying in store	14%




## How should it look?

Having the right image is essential to the homepage and something bold and eye-catching is key. Darker backgrounds help the image stand out from the webpage and allow the colours to pop. The image shown below increased attention by 9%pts. For pork, the colours of raw meat are less appealing, therefore we recommend using cooked images.

If a picture of a dish is used, having the meat at the centre is important but it still needs to be part of a balanced dish to tie in the health messaging on the page.

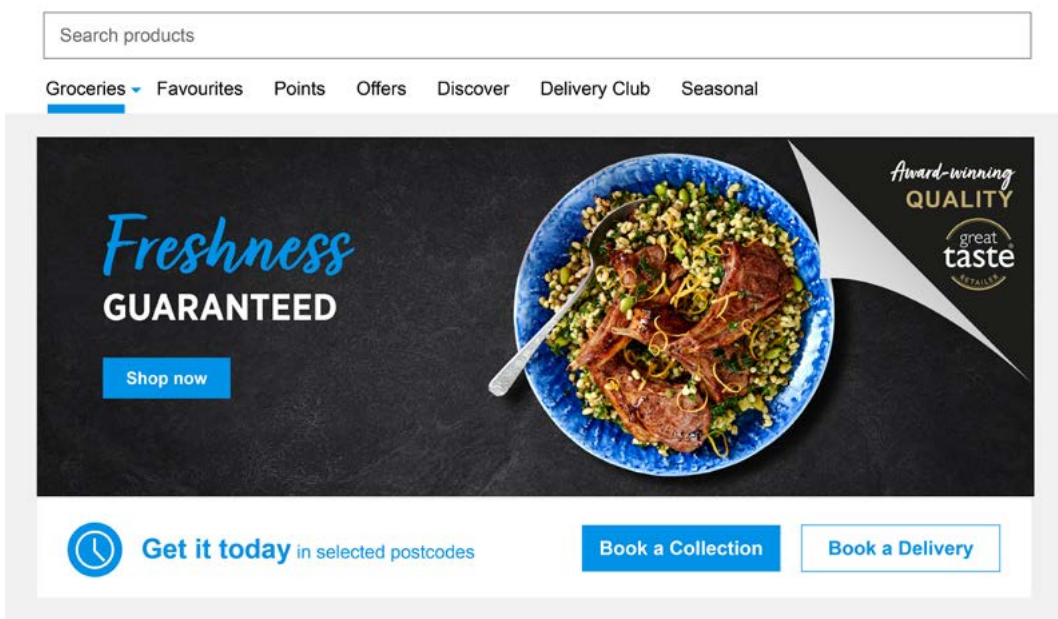
A call to action is needed on the banner so people know to click through to the page. Having this bold in a colour contrast box also drew people in and we saw a 6%pt increase in click-through.

Finally, the two messages used need to be on separate sides of the banner, with a single picture in the middle. Having two messages on opposite sides significantly increased the recall of the messaging.



The banner features a dark background with various cuts of raw meat, a knife, and herbs. On the left, the text reads "Low in fat" in green script and "HIGH IN FLAVOUR\*" in white bold. Below this is a green "Shop now" button. On the right, it says "Award-winning QUALITY" and "great taste" with a logo. A small asterisk note at the bottom left reads "\*On selected products." Three blue callout boxes point to specific elements: the "Shop now" button, the separated text and image, and the striking image of the meat.

+6%pts click through bold call to action	+13%pts recall separated message	+9%pts attention striking image
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The banner features a dark background with a blue plate of a cooked dish. On the left, the text reads "Freshness" in blue script and "GUARANTEED" in white bold. Below this is a blue "Shop now" button. On the right, it says "Award-winning QUALITY" and "great taste" with a logo. Below the banner, there is a search bar, navigation links (Groceries, Favourites, Points, Offers, Discover, Delivery Club, Seasonal), and three buttons: "Get it today in selected postcodes" (with a clock icon), "Book a Collection", and "Book a Delivery".

An example of an optimised homepage

Category engagement  
**+6%pts**

## SEARCH PAGE

It is vitally important to get the search page right, as 71% of shoppers visit a search results page and around half of all items are added to the basket from here. The most effective messages on the search page were those which reassured shoppers about the production quality of the meat. Messages should be more detailed than the homepage and have a suitable tagline.

### What should it say?

Shoppers want more detail on the product credentials on the search page, whether it is messaging on how the product would make a tasty dish, the health benefits or the production method through animal welfare and sustainability. Two messages on the search page proved the optimum number to increase perceptions without overwhelming.

Some of the main reasons shoppers claim to be cutting back on buying red meat over the last few years have been health, environmental concerns and animal welfare. If we can promote the positive benefits of red meat within these areas, then we can hopefully reduce the number of shoppers turning away from red meat in the long term.

There were nuances on what these messages should be by meat type. However, copy with inspirational messaging gained the greatest attention and interaction by far. This appeal was heightened even more with a younger audience.

For a second message, lamb shoppers engaged with sustainability and welfare messaging.




For pork, messages which resonated most were vitamins and minerals or animal welfare.

For beef shoppers, any of the three reassuring messages, vitamins and minerals, animal welfare or sustainability work well. For more premium beef cuts such as roasting or steaks, sustainability may be a good option as shoppers are more concerned about this element of beef. As mince or stewing are more everyday cuts, shoppers may respond better to vitamin and mineral messaging.

Again, because of the flexibility of the platform, a mix and match approach can be taken.

### Meal inspiration




Messaging should focus on building shoppers' confidence in cooking and inspire them to try new dishes.

	Consumer first choice (%)
How to cook the perfect roast	31% 
Delicious dishes crafted by you	21% 
Want more flavour? Be inspired	17% 
For a meal to remember. Be inspired	16%
This way for mealtime inspiration	14%

### Health

Messaging should remind shoppers of the positive benefits of red meat including its vitamin and mineral content and the personal benefits to health.




These messages have been approved by AHDB and the British Nutrition Foundation and can be used across all red meat products.

	Consumer first choice (%)
A great source of iron, zinc, potassium and B12 for good health	29% 
Supports good health with iron, zinc, potassium and B12	22% 
Contains B12 to support a normal immune system	18% 
A natural source of B12 which can help reduce fatigue	17%
A good source of potassium to help support normal blood pressure	13%

## Sustainability

Messaging should communicate the steps farmers are taking to reduce their impact on the environment with the help of retailers. Shoppers are becoming more familiar with environmental messaging and are more familiar with terms such as net zero than a year ago.



These messages have been approved by AHDB environmental experts and can be used across all British red meat products.

	Consumer first choice (%)
Red meat from the UK is amongst the most sustainable in the world	26% 
Working with our British farmers to lower carbon emissions to net zero	25% 
UK red meat is amongst the most sustainable in the world, with a net-zero target for 2045	18% 
Produced in the UK with lower carbon emissions than the world average	17%
British agriculture has the goal of reaching net zero greenhouse gas emissions by 2045	13%

## Animal welfare

Messaging should communicate how retailers are working with farmers to ensure high standards of animal welfare as well as details of any schemes or accreditations used.

These messages can only be used on products that can prove high animal welfare standards and do not apply to all British products.

	Consumer first choice (%)
Produced in the UK and ensures the high standards of animal welfare	28% 
Thanks to high levels of animal welfare, our beef, lamb and pork are produced in the UK to world-class food and farming standards	27% 
Produced in the UK to world-class food and farming standards	25% 
We win awards for our high animal welfare	11%
Accredited via our high animal welfare schemes	9%

## How should it look?

On the search page, messaging within the product list was by far the most attention-grabbing and noticed, with 84% of people interacting with this space. Whereas, top and side banners, as well as individual messaging below products, saw only 34% of shoppers engage. Therefore, we recommend having the primary message integrated.

Groceries ▾ Favourites Points Offers Discover Delivery Club Seasonal

### 317 results for 'Beef mince'

**Category**

- Meat (147)
- Delicatessen (18)
- Food cupboard (61)
- Ready meals (52)
- Pets (32)
- + Show more











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*About our ranges*

**Premium**  
Make meal-times special. Featuring the finest cuts from our preferred UK farms.

**Mid Tier**  
Protein-packed favourites to make every meal appetising.

**Everyday Value**  
All your meat and poultry essentials at an affordable price.

 <b>Steak Mince 20% Fat</b> 500g £2.05 (£4.10/100g) <a href="#">Add</a>	 <b>Organic Beef Mince 5% Fat</b> 250g £3.20 (12.78/100g) <a href="#">Add</a>	 <b>Premium Aberdeen Angus Steak Mince 15% Fat</b> 500g £3.75 (£7.50/100g) <a href="#">Add</a>	 <b>Everyday Value Beef Mince 5% Fat</b> 500g £2.15 (£4.30/100g) <a href="#">Add</a>
 <b>Premium Aberdeen Angus Steak Mince 5% Fat</b> 500g £4.55 (£9.10/100g) <a href="#">Add</a>	 <b>Steak Mince 15% Fat</b> 750g £3.89 (£5.19/100g) <a href="#">Add</a>	<div style="font-size: 2em; font-weight: bold;">84%</div>	
 <b>Steak Mince 5% Fat</b> 500g £3.10 (£6.20/100g) <a href="#">Add</a>	 <b>Everyday Value Beef Mince 15% Fat</b> 500g £1.80 (£3.60/100g) <a href="#">Add</a>	 <b>Organic Beef Mince 15% Fat</b> 500g £4.65 (£9.29/100g) <a href="#">Add</a>	 <b>Premium Aberdeen Angus Steak Mince 20% Fat</b> 500g £3.00 (£6.00/100g) <a href="#">Add</a>

34%

Search page showing the % of shoppers who said the section grabbed their attention.

## Imagery

We tested having a dish instead of the product pack shot but this was the least liked inspirational option of all the ones we tested. Shoppers like to be able to see the pack as it helps them to identify the product. Further enhancing the pack shot as discussed earlier would be the best option.

Everything we learnt about the use of imagery on the communication assets applies across the pages we tested.

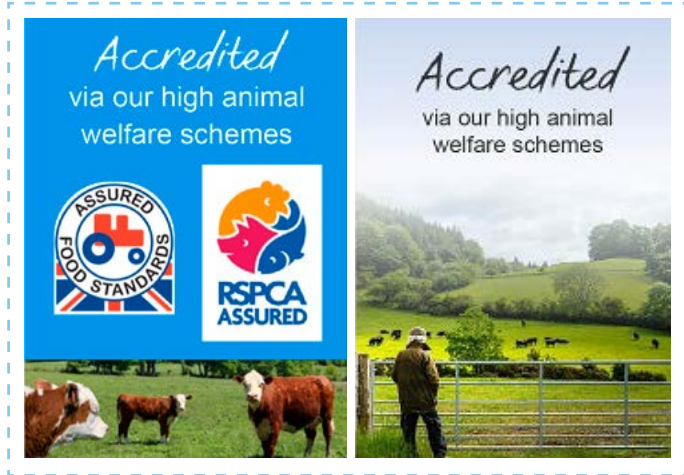
Purchase intent increased by 5%pts when logos such as Red Tractor or RSPCA Assured were included in welfare messaging. However, logos need to feature alongside an explanation, as they are less effective on their own.



Farming imagery, whether for sustainability or animal welfare, should feature green fields with farmers at the forefront. Animals can be in the background but should not be the focus of the image. Images should be recognisably British and feature a British flag where possible.



An optimised welfare asset



Less effective welfare assets



An optimised health asset

For health messaging, including an image of a healthy dish boosts likability. The dish should be a balanced plate, where meat is the focus but includes vegetables. The meal also needs to be vibrant in colour to inspire shoppers.



A less effective health asset

Meal inspiration is very dependent on the right imagery. Having exciting dishes, which look easy to cook, is essential. Vibrant and eye-catching colours help the dish stand out.

## Animation

Adding animation to certain pages can increase purchase intent by 6%pts compared to the baseline for the search page. However, this was not the case on the homepage where purchase intent decreased with animation, as shoppers prefer a simpler message.

## How could we communicate quality tiering?

Shoppers use the quality of a product as a proxy for how it will taste, as they can't see the product for themselves. One way shoppers assess quality is through tiering.

We tested a range of different ways to communicate tiering to shoppers and the two most effective were: 1. Description and colour blocking 2. Description and roundel

### Description and roundel

This screenshot shows search results for 'beef' with a focus on quality tiers. The products are arranged in a grid with blue 'Add' buttons. The tiers are: Premium (top row), Mid Tier (middle row), and Everyday Value (bottom row). The 'Premium' tier products have a blue 'premium' roundel in the top left corner. The 'Mid Tier' products have a red 'Mid Tier' roundel. The 'Everyday Value' products have a blue 'Everyday Value' roundel. The descriptions on the left side of the page are also color-coded to match the tiers.

### Description and colour block

This screenshot shows search results for 'beef' with a focus on quality tiers. The products are arranged in a grid with blue 'Add' buttons. The tiers are: Premium (top row), Mid Tier (middle row), and Everyday Value (bottom row). The 'Premium' tier products have a blue background. The 'Mid Tier' products have a red background. The 'Everyday Value' products have a light blue background. The descriptions on the left side of the page are also color-coded to match the tiers.

## Confidence selecting the right quality product

+9%pts

+11%pts

### Ordered

This screenshot shows search results for 'beef mince' with a focus on quality tiers. The products are arranged in a grid with blue 'Add' buttons. The tiers are: Premium (top row), Mid Tier (middle row), and Everyday Value (bottom row). The 'Premium' tier products have a green background. The 'Mid Tier' products have a red background. The 'Everyday Value' products have a light blue background. The descriptions on the left side of the page are also color-coded to match the tiers.

### Mixed

This screenshot shows search results for 'pork steak' with a focus on quality tiers. The products are arranged in a grid with blue 'Add' buttons. The tiers are: Premium (top row), Mid Tier (middle row), and Everyday Value (bottom row). The 'Premium' tier products have a green background. The 'Mid Tier' products have a red background. The 'Everyday Value' products have a light blue background. The descriptions on the left side of the page are also color-coded to match the tiers.

## Purchase intent

+6%pts

-6%pts

When testing the colour blocking option on one of our journeys, it showed that when tiers were in order, purchase intent increased. However, when the tiers were mixed up it became more confusing for shoppers and purchase intent decreased.

Having functionality to allow shoppers to sort or filter by the tiers could be a good option.

## What is the impact?

Increasing purchase intent on the search page is hard as shoppers have already planned their purchases. For everyday products, such as beef mince, we saw purchase intent increase by 6%pts as it is a more easily used and storable product. However, for more occasional cuts such as lamb joints and pork steaks we didn't see people buying more but we did see some shoppers trading up size and tier for lamb.

The key success of messaging on the search page was increased perceptions about red meat. There was an 8%pt increase in shoppers feeling very positive about the industry. Driving perceptions of red meat being exciting, healthy and sustainable will reassure shoppers and lead to longer-term gains.

**+8%pts Category perceptions**  
makes them feel very positive about the red meat industry

**317 results for 'Beef mince'**

**Category**

- Meat (147)
- Delicatessen (18)
- Food cupboard (61)
- Ready meals (52)
- Pets (32)
- [+ Show more](#)

---

*About our ranges*


**Premium**  
Make meal-times special. Featuring the finest cuts from our preferred UK farms.


**Mid Tier**  
Protein-packed favourites to make every meal appetising.

**Everyday Value**  
All your meat and poultry essentials at an affordable price.

---


*All our fresh beef*  
is produced in the UK and ensures the highest standards of animal welfare






**Steak Mince 20% Fat**  
500g  
£2.05 (£4.10/100g)

[Add](#)




**Organic Beef Mince 5% Fat**  
250g  
£3.20 (12.78/100g)

[Add](#)




**Premium Aberdeen Angus Steak Mince 15% Fat**  
500g  
£3.75 (£7.50/100g)

[Add](#)




**Everyday Value Beef Mince 5% Fat**  
500g  
£2.15 (£4.30/100g)

[Add](#)




**Premium Aberdeen Angus Steak Mince 5% Fat**  
500g  
£4.55 (£9.10/100g)

[Add](#)



**Steak Mince 15% Fat**  
750g  
£3.89 (£5.19/100g)


[Add](#)



*Delicious dishes crafted by you*  
*Beef and sweet pepper quesadilla*


Peppers + Chorizo + Mozzarella

[Add ingredients](#)




**Steak Mince 5% Fat**  
500g  
£3.10 (£6.20/100g)

[Add](#)




**Everyday Value Beef Mince 15% Fat**  
500g  
£1.80 (£3.60/100g)

[Add](#)



**Organic Beef Mince 15% Fat**  
500g  
£4.65 (£9.29/100g)

[Add](#)



**Premium Aberdeen Angus Steak Mince 20% Fat**  
500g  
£3.00 (£6.00/100g)

[Add](#)

An example of an optimised search page

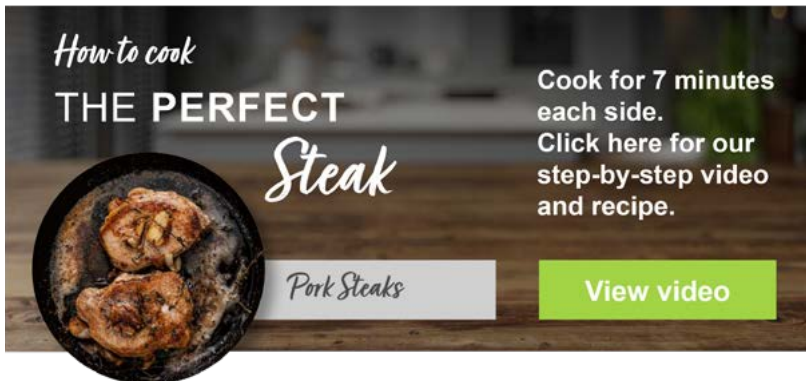


## PRODUCT PAGE

Only 10% of shoppers click through to the product page when shopping for meat. However, shoppers who reach this page are looking for additional information to confirm they are making the right purchase. This is especially true for premium products as shoppers want to make sure they are spending their money on a quality product.

### What should it say?

Overall shoppers are more engaged on the product page, so can handle three messages. These differ by cut type. For more premium cuts inspiration, sustainability and welfare are the most effective messages as shoppers want inspiration as well as reassurance of the quality of production. For more everyday cuts, such as beef mince, shoppers again want inspiration for different meals as well as one of welfare, sustainability or health, alongside a quality or freshness message.



For inspiration, there can be more detail including recipe details, how-to-cook guidance or step-by-step videos. Having this meal inspiration on the page increased perceptions of taste by 8%pts.



For health, listing out a range of health credentials or consumer benefits works. Vitamin and mineral messaging saw shoppers' health perceptions of the product increase by 5%pts on average. This messaging was particularly effective for beef mince with health perceptions up 12%pts.

Sustainability and welfare messaging convey the production quality of the meat to shoppers. In our research, different messaging changed what influenced shoppers to purchase a product. For the baseline aisle, the majority of shoppers said they picked a product because it looked good quality and it is what they usually have.





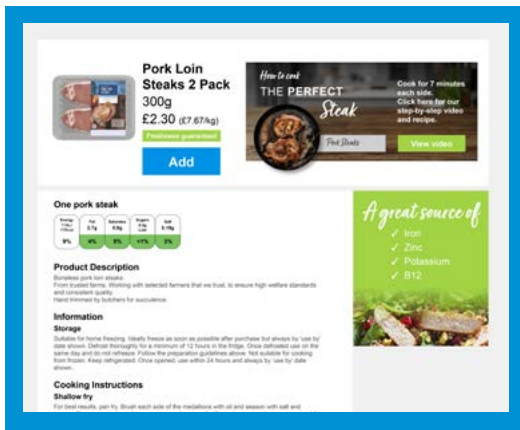
For lamb with a sustainability message, we saw an increase in shoppers purchasing lamb because it was a sustainable option, up 13%pts. For beef with a welfare message, shoppers' confidence in animal welfare increased by 5%pts.



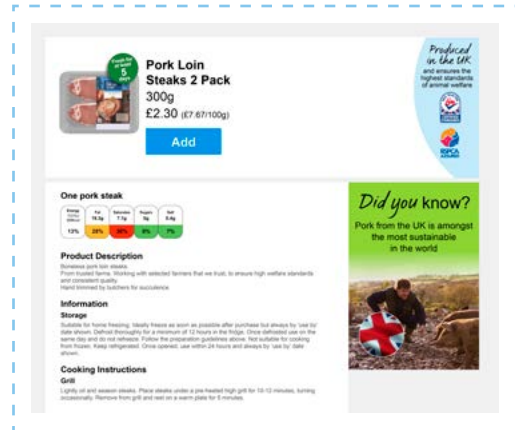
While messaging around freshness and quality should have the least amount of detail, these remain crucial as they are seen as very relevant and convey the high quality of the product. When present, there was a 6%pt uplift in shoppers finding the information reassuring.

### How should it look?

Shoppers say they prefer a consistent colour pallet across the different assets, with research showing a 13%pt uplift in those saying they liked the colours used when the colours were consistent. Different colours for each message were tested in case it helped shoppers distinguish between the messages, but this was not the case.



Optimised with consistent colours on the product page



Less effective with different colours on the product page

## Imagery

The imagery learnings are covered in the search page section and the same principles apply throughout all content used. This is how they are translated to the product page:



With the right imagery, likeability increased by 7%pts on the product page.

## Animation


For the product page, animations, including a video of the inspirational recipe, saw purchase intent increase by 7%pts – the most effective of all the three pages.

## What is the impact?

Shoppers are more engaged on the product page, so we saw a positive increase in purchase intent and an uplift in category perceptions.

**Purchase Intent +6%pts**  
highly likely to purchase after  
seeing the product page


**Category perceptions +5%pts**  
makes them feel very positive about  
the red meat industry



**Steak Mince**  
5% fat  
500g  
£3.10  
(£6.20/kg)

Add

*Working with* our British farmers to lower carbon emissions to net zero



**Per 125g**

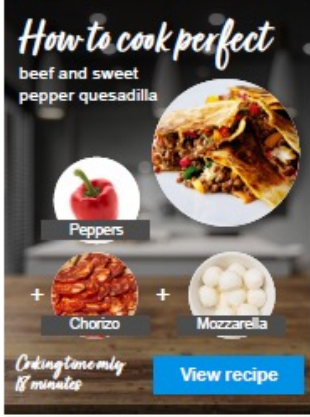
Energy 600kJ 150kcal	Fat 5.8g	Saturates 2.5g	Sugars 0g	Salt 0.3g
8%	8%	13%	0%	5%

**Product Description**  
Lean beef steak mince 5% fat. We work in partnership with trusted farmers to ensure high welfare standards from farm to fork, to deliver great quality beef. From Trusted Farms. Leaner selected cuts, finely ground for tenderness.

**Information**  
**Legal information**  
Minced meat products require thorough cooking prior to consumption. Packaged in a protective atmosphere.

**Storage**  
Suitable for home freezing. Ideally freeze as soon as possible after purchase but always by 'use by' date shown. Defrost thoroughly for a minimum of 12 hours in the fridge. Not suitable for cooking from frozen. Once defrosted use on the same day and do not refreeze. Follow the preparation guidelines above. Keep refrigerated. Once opened, consume within 1 days and by 'use by' date shown.

*How to cook perfect*  
beef and sweet pepper quesadilla



View recipe

An example of an optimised product page

## TRENDS FOR THE FUTURE

Online shopping will continue to evolve and innovate making it a very exciting marketplace. Three key areas of development are:

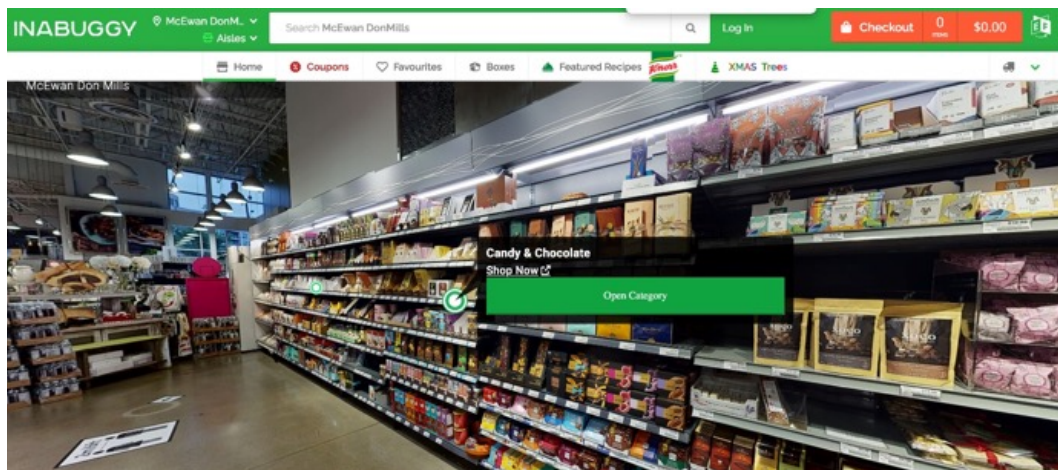
### Shopping experience

As online retailers struggle to differentiate on core aspects such as price and choice, the shopping experience has become key. Content to entertain, inspire and educate will create a unique experience for the shopper.

In the US, Albertsons is partnering with Firework, the short-form video platform designed to bring a shoppable, livestream video experience to any website. Albertsons is using the platform for short video content and cooking experiences, as well as live videos from stores.

There is an opportunity for farmers and retailers to use livestreaming as a channel for transparency and to educate the public. According to Foresight Factory, 38% of UK consumers watched a live video stream in 2020, so the reach potential is high. In China, Alibaba launched its Rural Support Program allowing farmers to access Alibaba's live streaming channel for free to sell produce that would otherwise go to waste.





Virtual grocery stores are an opportunity to make a more sophisticated and enjoyable online shopping experience. In late 2020, Canadian grocer Inabuggy launched a virtual 3D shopping experience to replicate bricks and mortar, which can be accessed on a browser or smartphone.

Walmart have taken it to the next level with their [Virtual Reality \(VR\) Metaverse](#) offering. And while it seems hard to think of us donning VR headsets to do our grocery shop, consumer trends agency Foresight Factory project one in four of us will own a VR headset by 2025, and tech experts are betting on smart glasses making a comeback

## Shopping Assistance

Guidance can come in many forms. The simplest being the utilisation of filters with 50% of shoppers claiming they would use filters to find products with specific claims, for example, organic, British or recyclable packaging. But this area is set to grow with smart assistant innovation. According to our research, 45% of shoppers would use a virtual assistant to order online if available. This could be as simple as online shopping assistant bots. But Carrefour in France has gone further with its most recent development of a personal shopping service called OK Market! This connects shoppers directly with a personal shopper allowing the customer to give detailed specifications, such as ideal expiry dates. For meat, this could even include notes on desired thickness or fat marbling on steak.

Personalisation by giving individualised food recommendations is another area to watch, particularly to support health goals. One in two UK consumers are interested in DNA health personalisation (Foresight Factory) with tech firms launching AI-personalised recipes based on personal nutrition data.

## Delivery

Quick commerce is the current buzz word, with groceries delivered in less than one hour. It is one of the fastest growing segments of the food industry and it will continue to grow and attract more shoppers. According to Mintel, 15% of consumers claim to have used rapid delivery services in the last 12 months (Online Grocery Retailing UK, 2022) and IGD state 78% of quick commerce shoppers will continue using the service in the future (The future of quick commerce, 2021). 2021 saw the launch of numerous rapid delivery options; pure players like Getir, third party firms such as Deliveroo unveiling 'Deliveroo Hop' and retailer responses such as Tesco 'Whoosh' and Sainsbury's 'Chop Chop'. With technology advancements playing a part in the actual delivery, autonomous vehicles and even drones are being tested by grocers in the US and Australia.

It is not just about speed. With consumer lifestyles becoming busier, delivery options need to adapt to meet different needs. In 2021, Asda tapped in to the 39% of online shoppers who say deliveries direct to lockable outdoor boxes are appealing (Mintel, Online Retailing: Delivery, Collection and Returns UK, 2021). A 12-week trial of these insulated lockers allowed customers to retrieve their shopping at their own leisure.



In the US, Walmart is expanding its in-home delivery service as Mintel reports a third of online grocery shoppers would be happy to allow delivery drivers limited-time access to their homes to unpack groceries when they are not in. Similarly, Amazon is offering delivery to car boots.

## METHODOLOGY

This report is based on research conducted in the early part of 2022, commissioned by AHDB with Linney Insight – an agency that specialises in shopper research. To answer the brief on how to engage shoppers with meat while online, the research took a three-stage approach.

The purpose of stage one was to streamline 26 messaging concepts, which AHDB had defined with the help of industry stakeholders. These 26 concepts sat across four main themes important to shoppers: meal inspiration, health, environment/farming, and online. The research involved 618 online grocery shoppers being presented the concepts via an online survey. A series of time-based perception questions were asked as well as statistical choice-based trade-off analysis and correlations, whittling the concepts down to best performing (whether that be an existing concept or a new harmonised one).

The purpose of stage two was to take the seven successful concepts from stage one to scenario testing in a realistic website setting. The Linney design team mocked up each of the seven themes on four different webpage types: the homepage, search bar, search page and product page. 1200 online grocery shoppers were split across the web pages to roam, choose their favourites and feedback.

The purpose of stage three was to take the learning from stage two and see how the concepts worked together in a complete shopper journey. Each shopper saw one of five journeys with a range of messaging. They would all see a homepage and a search and product page for beef mince, lamb joints and pork steaks. Throughout the journey, shoppers were able to browse the pages and select their likes and dislikes. Respondents also completed a shopping exercise to see which products, if any, they would add to their baskets – highlighting which activations have the greatest potential to influence.

Throughout the research, the sample was nationally representative of online shoppers who were either fully or jointly responsible for the grocery shop and would consider buying meat, fish and poultry.

To find out more about the methodology or results, please contact the team at [strategic.insight@ahdb.org.uk](mailto:strategic.insight@ahdb.org.uk)





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AHDB's Retail Insight Team actively analyses retail trends, reporting on the latest sales trends and what they mean for the agricultural industry.

Read more on retail and consumer trends on our website [ahdb.org.uk/consumerinsight](http://ahdb.org.uk/consumerinsight)  
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## Ask the analyst

If you'd like any more information on the areas covered or have suggestions for future content, then please email us at [strategic.insight@ahdb.org.uk](mailto:strategic.insight@ahdb.org.uk)

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